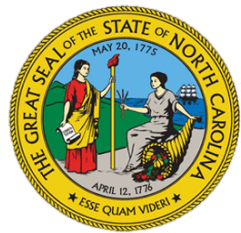# North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal Organization Management User Guide

Version 2

March 11, 2021

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

If you have any questions, issues or requests, please go to the

CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the COVID-19 Provider Help Center at (877) 873-6247 and select option 8. The COVID-19 Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code
   NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)
   For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
3. You will receive an e-mail with your username and temporary password to log into the portal
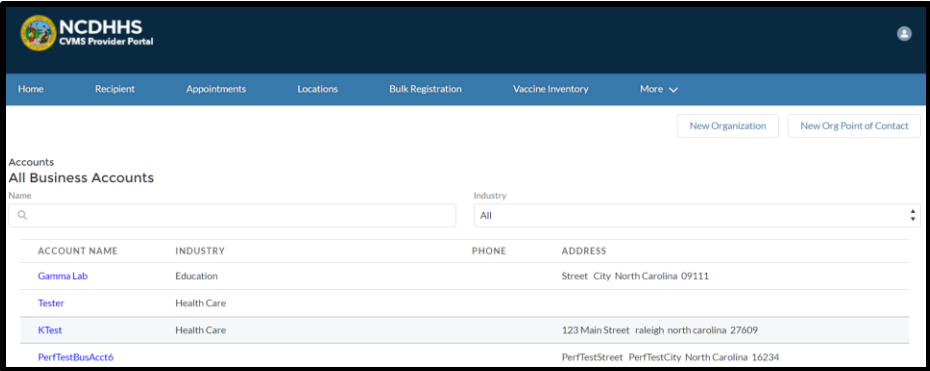
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Organization Management Overview

Overview

In this user guide, we will review Organization Management.

Organization Management will allow you to onboard frontline organizations to the CVMS Organization Portal.

- Search & create new frontline organizations and organization points of contact
- Edit frontline organization and organization points of contact details

The processes included in this user guide are for users with the **Healthcare Location Manager** profile only**.**

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log in the CVMS Provider Portal with your NCID username and password at https://covid-vaccine-provider-portal.ncdhhs.gov

Now, let's get started!
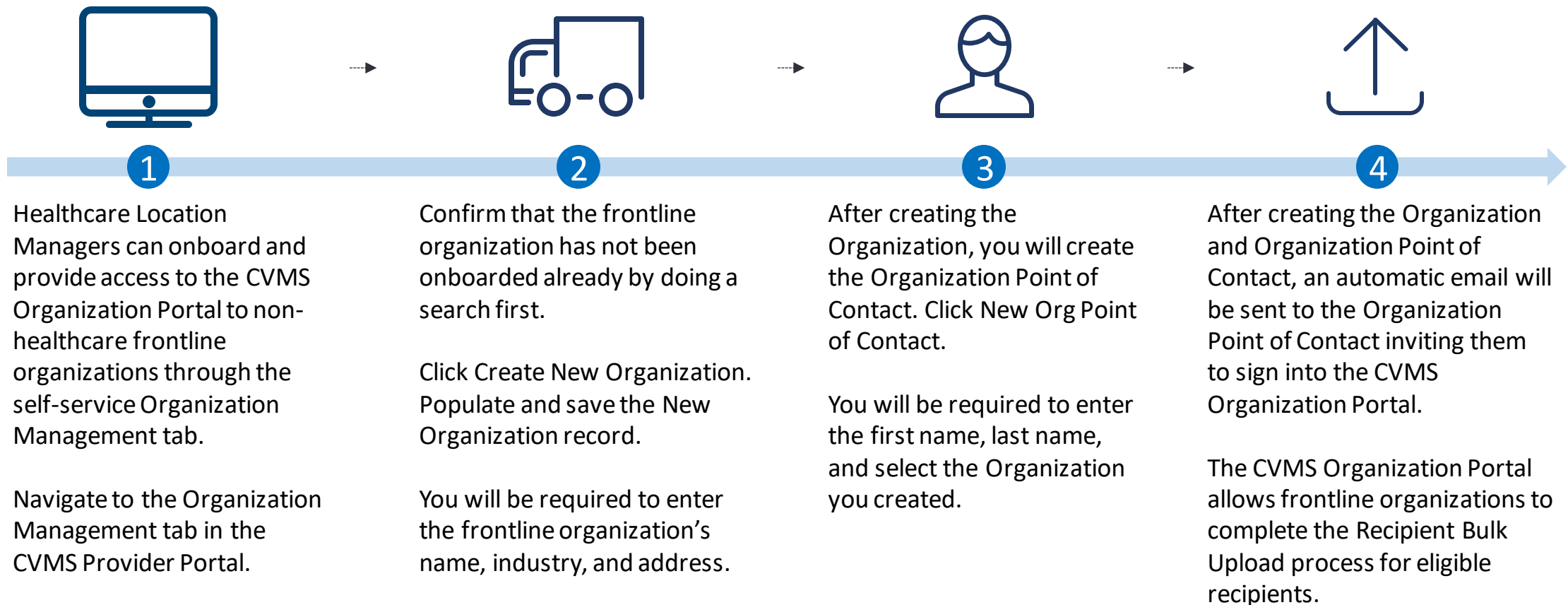
Key Terms

CVMS Organization Portal	The CVMS Organization Portal is for frontline organizations (that are not healthcare vaccine providers) to upload eligible recipients (e.g., their employees) into CVMS. These organizations can be registered by NCDHHS or by the Healthcare Location Managers of any provider in the CVMS Provider Portal. Once registered, these frontline organizations can upload eligible recipients through the Recipient Bulk Upload process. Recipients uploaded by the frontline organization will be invited to register in the COVID-19 Vaccine Portal prior to getting their first COVID-19 vaccination.

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Organization Management Overview

The Organization Management process enables Healthcare Location Managers to onboard frontline organization to the CVMS Organization Portal. **Before onboarding a new frontline organization, it is important to ensure they fall within the State of North Carolina's COVID-19 vaccine prioritization guidelines.**
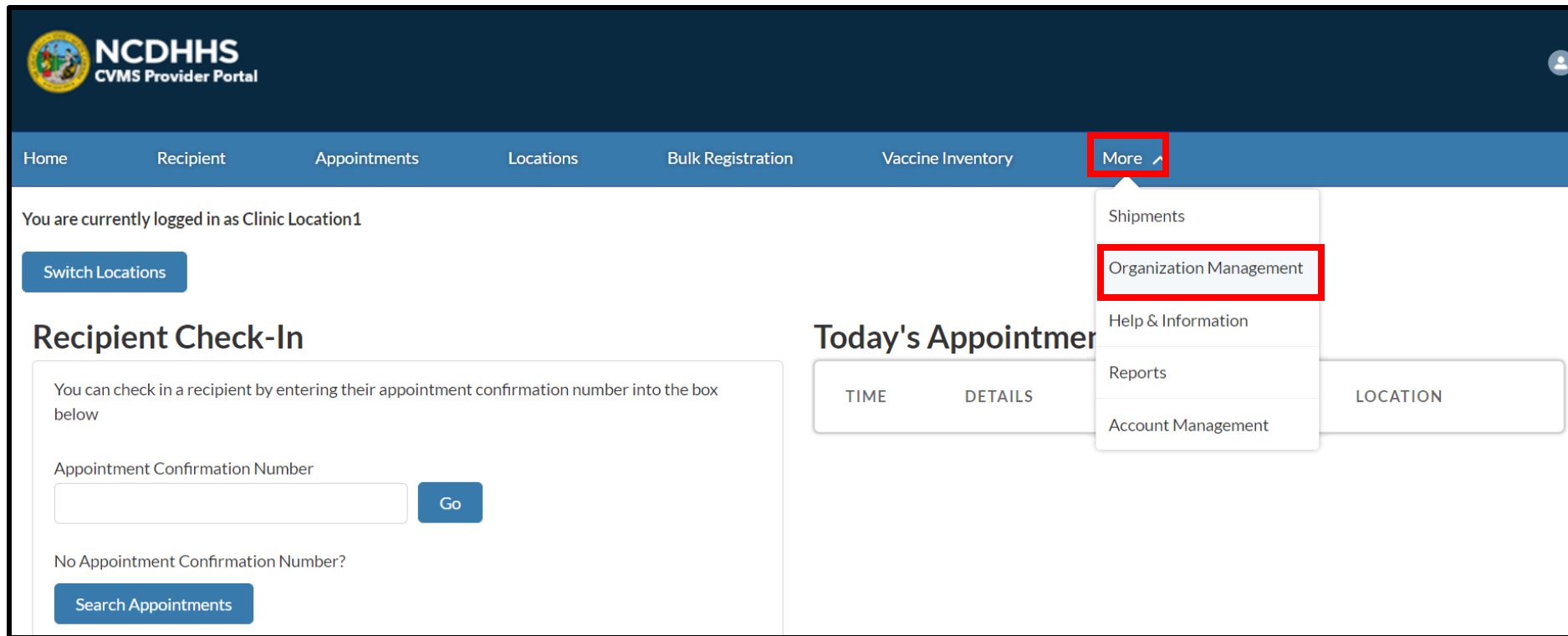
1

Healthcare Location Managers can onboard and provide access to the CVMS Organization Portal to non-healthcare frontline organizations through the self-service Organization Management tab.

Navigate to the Organization Management tab in the CVMS Provider Portal.

2

Confirm that the frontline organization has not been onboarded already by doing a search first.

Click Create New Organization. Populate and save the New Organization record.

You will be required to enter the frontline organization's name, industry, and address.

3

After creating the Organization, you will create the Organization Point of Contact. Click New Org Point of Contact.

You will be required to enter the first name, last name, and select the Organization you created.

4

After creating the Organization and Organization Point of Contact, an automatic email will be sent to the Organization Point of Contact inviting them to sign into the CVMS Organization Portal.

The CVMS Organization Portal allows frontline organizations to complete the Recipient Bulk Upload process for eligible recipients.

Create an Organization

Step 1 of 5: Navigate to the Organizational Management Screen

You can onboard new non-healthcare organizations to the CVMS Organization Portal. Each organization will also require an organization point of contact. To begin, let's add an organization.

1. Navigate to the **MORE** tab and select **ORGANIZATION MANAGEMENT**

Audience

Healthcare Location Manager

Tips

As a Location Manager, it is imperative that you closely follow that state's COVID-19 risk-based prioritization guidelines. For regulatory assistance, visit the Immunization Branch website at https://covid19.ncdhhs.gov/vaccines/providers

Step 2 of 5: Open the New Organization Form

Complete a search first to ensure that the frontline organization does not already exist in CVMS.

1. Navigate to the search bar and enter the name of the frontline organization

2. If the frontline organization does not exist, click **NEW ORGANIZATION**

Audience

> Healthcare
> Location Manager

Tips

You only need to enter three characters from the frontline organization name to begin a search. The results will auto-populate. The more complete the name you enter, the more the results will filter.

The New Organization Form will now appear for you complete.

1. Enter the Organization Name

2. Select the appropriate **INDUSTRY** from the **DROP-DOWN MENU**

3. Click **CREATE ORGANIZATION**

Audience

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Tips

There are only two required fields. However, ensuring that an address is entered will simplify the process of searching for the frontline organization in CVMS when creating the Organization Point of Contact.

You must spell out the name of the state.

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Step 4 of 5: Review the Organization Record

Audience

Healthcare Location Manager

The Organization record will automatically appear. This is where you can review and edit the Organization record details.

1. **REVIEW** the Organization record data

2. If corrections are needed, click the **PENCIL ICON** next to the field you wish to edit

3. Continue to the next step

This screen displays fields to allow you to make necessary changes to the Organization record.

1. Enter corrected data

2. Click **SAVE**

3. Continue to the next section

Audience

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Create an Organization Point of Contact

Step 1 of 4: Open the Organization Point of Contact Form

Once the Organization Record is created, create a point of contact who will represent the frontline organization. This point of contact will be sent an email notification from the CVMS Organization Portal.

1. Click **NEW ORG POINT OF CONTACT**

Audience

Healthcare Location Manager

Tips

Please make sure to validate with the Point of Contact that they are the right individual to receive access before adding them to the CVMS Organization Portal.

The Point of Contact will be sent a validation e-mail that they need to respond to.

The New Org Point of Contact form

will now be displayed.

1. **POPULATE** the following fields

   • First name

   • Last name

   • Organization

   • E-mail address

   • Phone

2. Click **CREATE ORG POINT OF**

   CONTACT

Audience

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Tips

When searching for the frontline organization, enter at least three characters. Many frontline organizations have multiple locations. Select the appropriate frontline organization based on the address.

Though not required, it is a best practice to populate all fields.

Step 3 of 4: Review the Org Point of Contact Record

You will automatically be directed to the new Organization Point of Contact record.

1. **REVIEW** the Point of Contact Data

2. If changes are required, use the **PENCIL ICON** next to the field you want to edit

3. Continue to the next step

Step 4 of 4: Edit the Organization Point of Contact Record (if needed)

This screen displays fields to allow you to make any necessary changes to the Org Point of Contact record.

1. **ENTER** corrected data

2. Click **SAVE**

Audience

Healthcare
Location Manager

Organization Point of Contact Automatic E-mail Notification

Once the Point of Contact is created, they will be sent an e-mail welcoming them to the CVMS Organization Portal.

The email will include login instructions to the CVMS Organization Portal where they will be able to confirm their organization details and complete the Recipient Bulk Upload process.
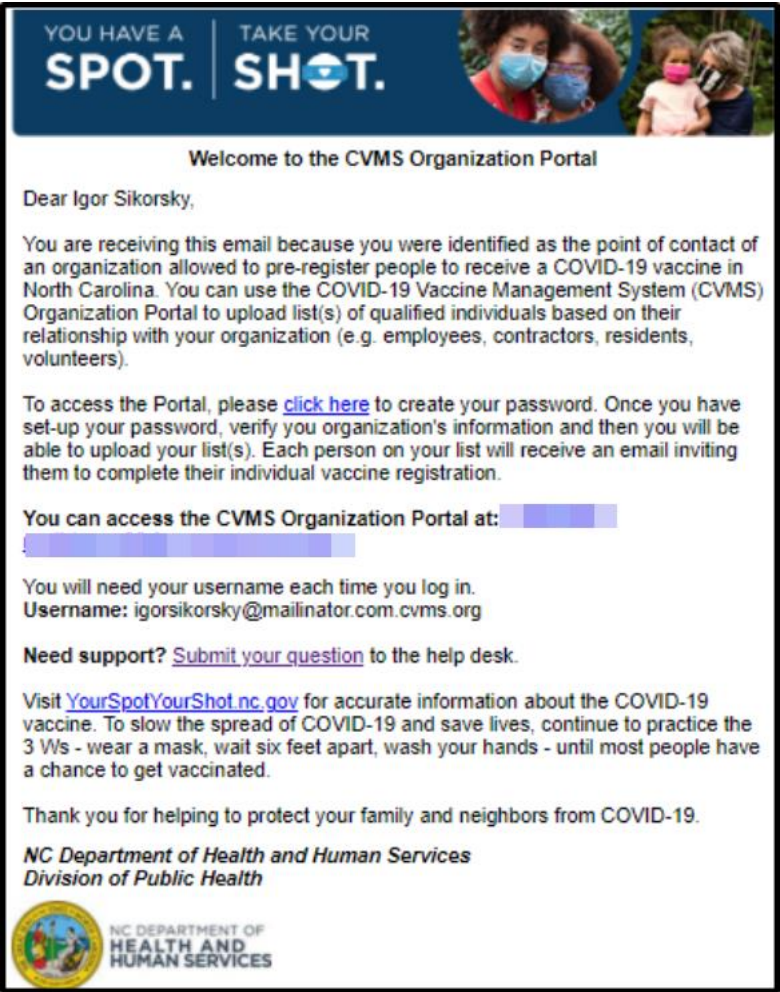
Audience

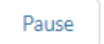Healthcare
Location Manager

Tips

The invited Organization Point of Contact's CVMS Organization Portal username will be the email address you upload for them PLUS .cvms.org. For example, a user with the email address of jane.doe@email.com would have a CVMS Organization Portal username of jane.doe@email.com.cvms.org

Appendix

Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- ⏷ A Toggle can be clicked to see selectable options.

- ✏ A Pen can be clicked to make edits to the field.

- Previous | Next Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- Pause A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge Non-Chromium browsers are not supported.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	2/17/2021	• Initial version		Azalea Troche, Darrell Lee, Kechia Scott
2	3/11/2021	• Added recipient check-in • Updated navigation bar to reflect latest revisions	5, 9, 10, 12, 15,, 17	Kechia Scott

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